Commercial Lines-AA Renewal Process

INSURANCE REVOPS

90 → 60 → 45 → 30 → 15 → 0 → + ★

Initial Review

1. Check current term for any changes (i.e. added driver, vehicle, exposure change, etc.).
2. Review any gaps in coverage.
3. Check Claims history and pull Loss Runs to confirm.
4. Schedule meeting with Producer on the account (if applicable).

Block Markets

1. Review 90 day notes.
2. Create Submissions to carriers to block markets (using last year's apps).
3. If E&S, begin process for Re-Applications and Supplementals.

Client Communication

1. Automated Email to Client "Your Renewal is Approaching has anything changed?"
2. Check for renewal pricing.
3. Quote Umbrella, EPLI, and Cyber (and send to customer).

E&S Only

1. Confirm and finalize Applications.

Confirmation and Documentation

1. Confirm payment if E&S.
2. Confirm signed docs on cross sold policies.
3. Prepare Renewal Certificates

Renewal!

1. Email "Thank you for Renewing" and Asking for Referral.
2. Send all COIs on file

Post Renewal

1. Three days post renewal- Confirm downloads and update policy status.
2. Send email asking for Testimonial or Social Review.